



UTAH CULTURAL ALLIANCE

40 YEARS



ARTS & CULTURE



Utah Department of
Heritage & Arts



AUDIENCE INTENT TO RETURN

2021 PUBLIC OPINION RESEARCH

APRIL 30 PRESS CONFERENCE REPORT

SURVEY METHODOLOGY

SAMPLING, MODE, & MARGIN OF ERROR

- For this survey, 1,104 Utah voters were sampled via the publicly available registered voter file. Completed surveys were conducted via online interviews.
 - An oversample of 649 Salt Lake County voters was also collected during the fielding period.
- The data were weighted to reflect statewide demographic composition according to descriptive statistics from the registered voter population.
 - Weights were used to ensure that the data reflected the population of the state as a whole, specifically in regards to age, gender, ethnicity, and county of residence.
- Online interviews were conducted March 3-22, 2021.
- The margin of error for a survey with 1,104 responses is approximately ± 3.0 percentage points.



1. The majority of Utahns are currently very comfortable visiting stores and restaurants and are slightly less comfortable visiting entertainment or cultural venues. However, among those currently uncomfortable, over half anticipate feeling comfortable within the next 6 months.
2. Across all live entertainment activities, 1 in 5 residents say they anticipate spending more on the activity post-covid. Festivals, parades, and concerts are the activities residents are most enthusiastic to reengage with.
3. Under current conditions, nearly half of respondents would be open to participate in outdoor concerts, plays, or other performances.
4. Mask requirements and surface sanitization are widely considered the most important safety measures that venues could take. In addition, widespread vaccination will also significantly increase comfort in attending live entertainment venues.
5. A plurality of Utahns would not attend an event requiring a covid test.

KEY FINDINGS TO REMEMBER

PRE-COVID ENGAGEMENT

AUDIENCE EXPERIENCE BEFORE THE PANDEMIC

ECONOMIC IMPACT OF ARTS & CULTURE

UTAH'S CREATIVE INDUSTRY BY THE NUMBERS – 2018*

155,551

EMPLOYED UTAHNS

\$4.8
billion

IN EARNINGS

\$264.3
million

NONPROFIT REVENUE

\$15.2
billion

GROSS SALES

\$7.2 Billion

Arts and cultural production in Utah added 4.3% or \$7.2 billion to the state's economy.

4% Growth

Creative industry jobs in Utah grew by 4%, making it the third fastest growing state.

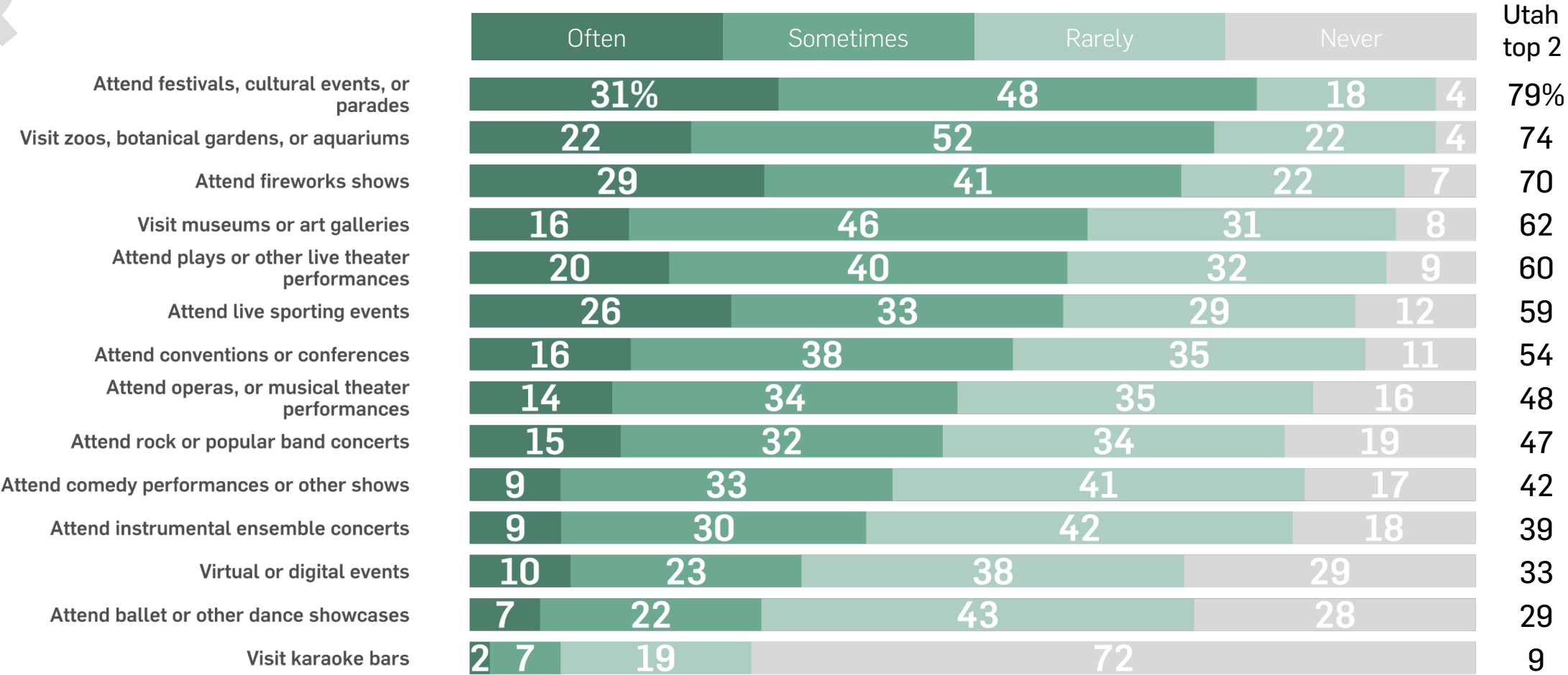
**2018 is the most recent year for which this data is available*

PRIOR TO PANDEMIC, FESTIVALS AND FIREWORKS WERE MOST FREQUENTED ACTIVITIES

Over 50% of respondents participated festivals, cultural events, parades, sporting events, plays, and other live theater performances with some frequency (sometimes + often). 9-in-10 voters rarely or never visit karaoke bars.



Thinking back to before the coronavirus outbreak, about how often did you or members of your household participate in the following types of activities? (n=950)

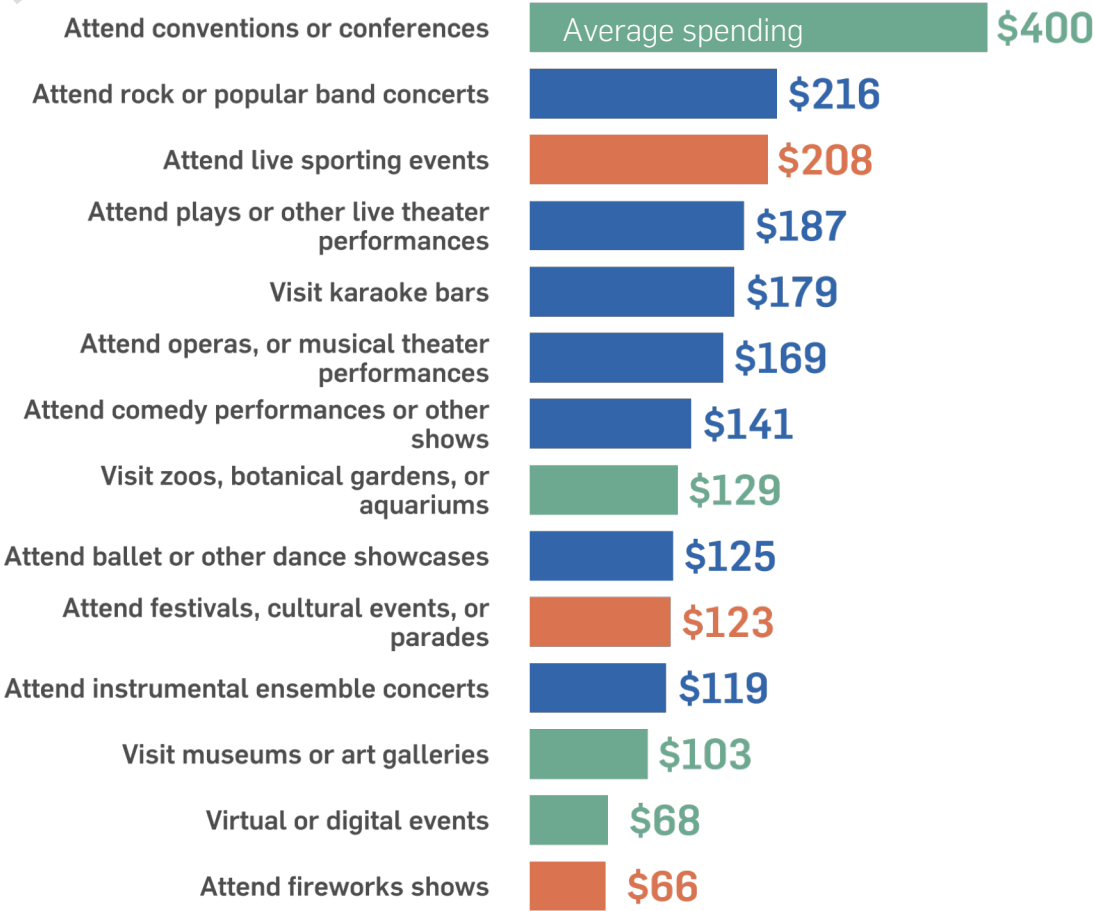


AVERAGE SPENDING ACROSS CATEGORIES EXCEEDS \$100

On average, residents spend \$183 when attending museums or educational events. Residents' spending for live performances is close behind with an average spend of \$170 per event. Spending is lowest for public events such as festivals, parades, and sporting, with an average of \$131 spent per event.



Thinking about the last time you participated in each of the following activities, about how much did you spend in total (including admission, concessions, merchandise, transportation, restaurants, etc.) on the outing? If you do not know the exact number, an estimate is fine. (n=91-236)



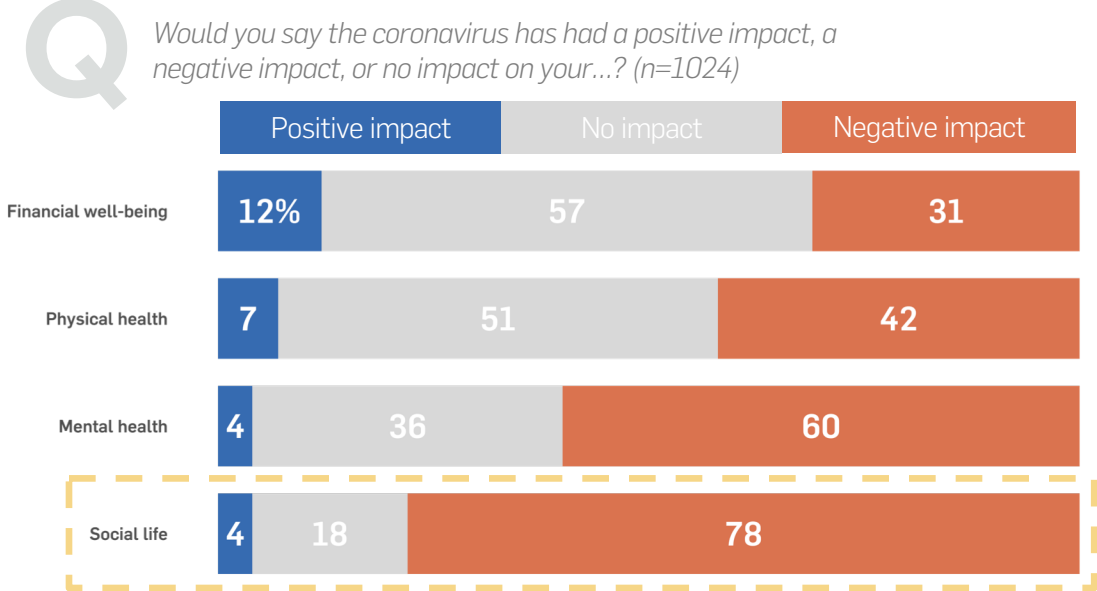
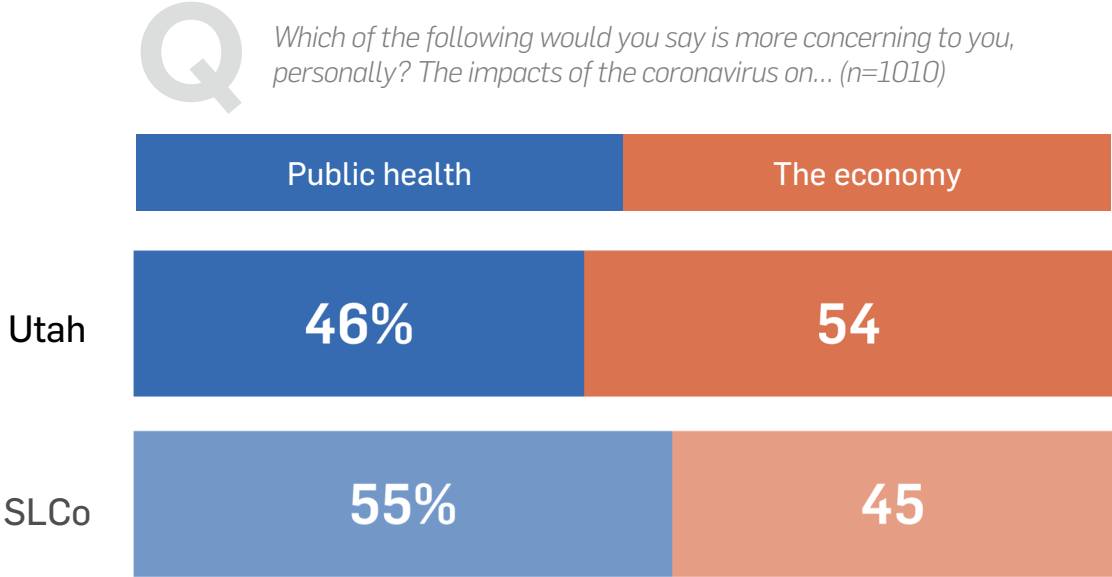
AUDIENCE EXPERIENCE

& ECONOMIC ACTIVITY IN THE MIDST OF COVID

COVID EXPERIENCES & PERCEPTIONS AT A GLANCE

The survey data present several indicators that voters see a light at the end of the pandemic tunnel. Most are confident in the effectiveness of personal and public safety measures. That said, A large majority of voters report that covid has had a negative impact on both their mental health and social lives.

Over half of respondents said that the impacts of coronavirus on the economy are more concerning than the virus's impact on public health. The story is reversed among Salt Lake County residents, however, with 55% of SLCo respondents indicating that they are more concerned with public health impacts.

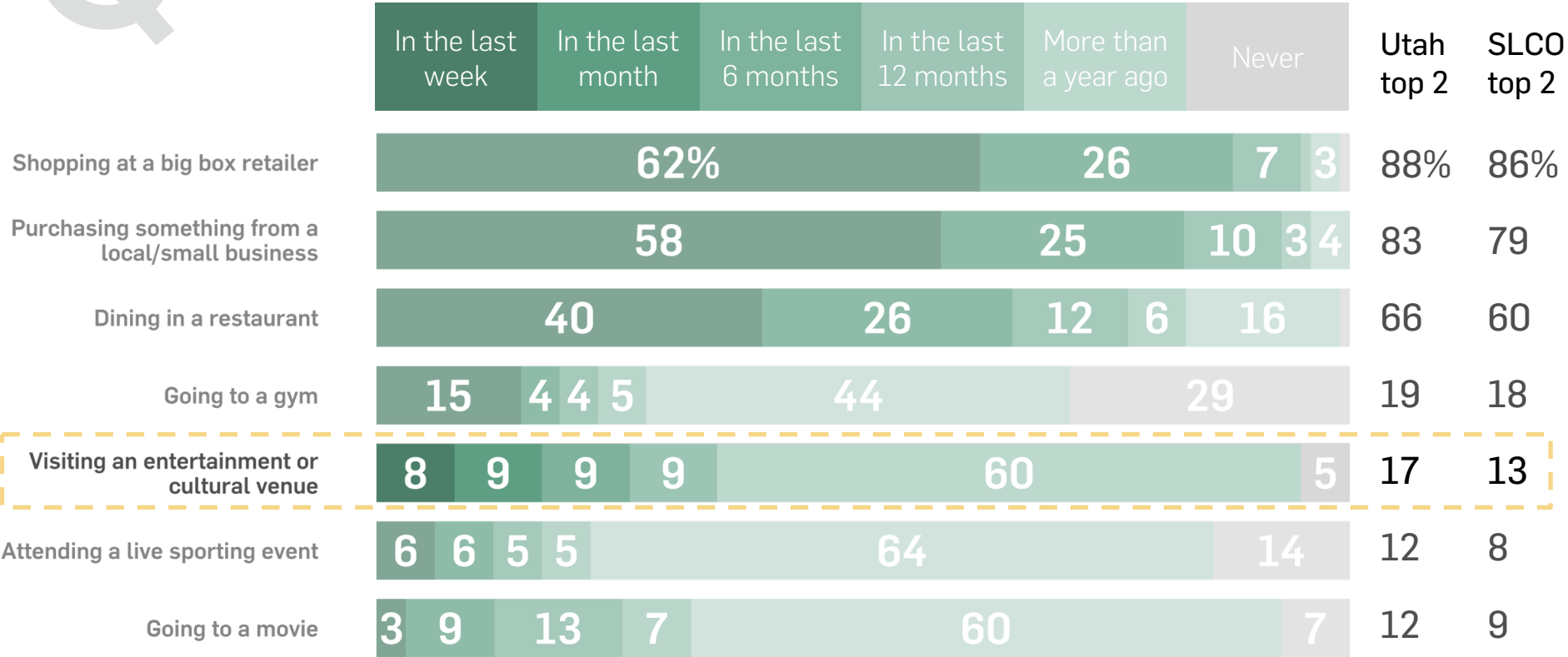


VISITS TO STORES AND RESTAURANTS HIGH WHILE VISITS TO VENUES REMAINS LOW

We're not quite back to business as usual in the cultural sector. Only 26% of Utahns report having visited an entertainment or cultural venue within the last 6 months. For 3-out-of-5 voters statewide, it has been more than a year.



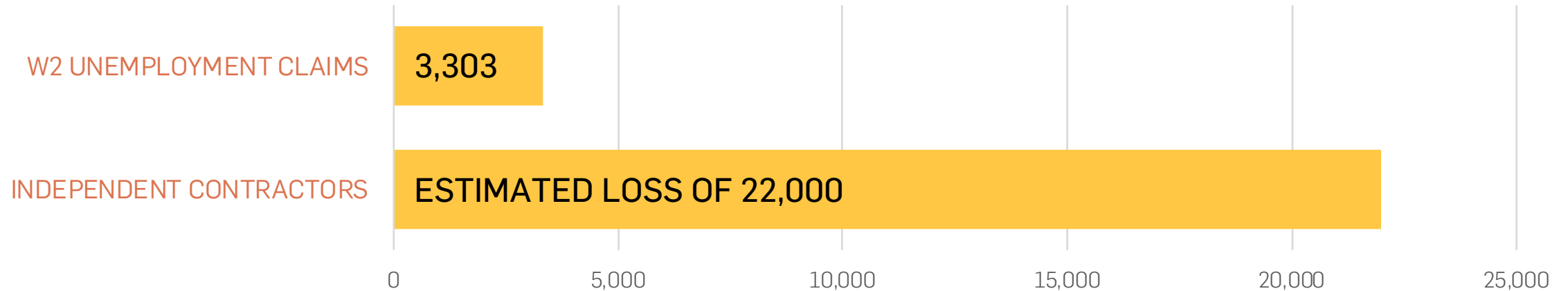
When was the last time you participated in each of the following activities? (n=977)



COVID-19 IMPACT ON THE CREATIVE INDUSTRY

ECONOMIC EFFECTS ON ARTS & CULTURE JOBS AND REVENUE

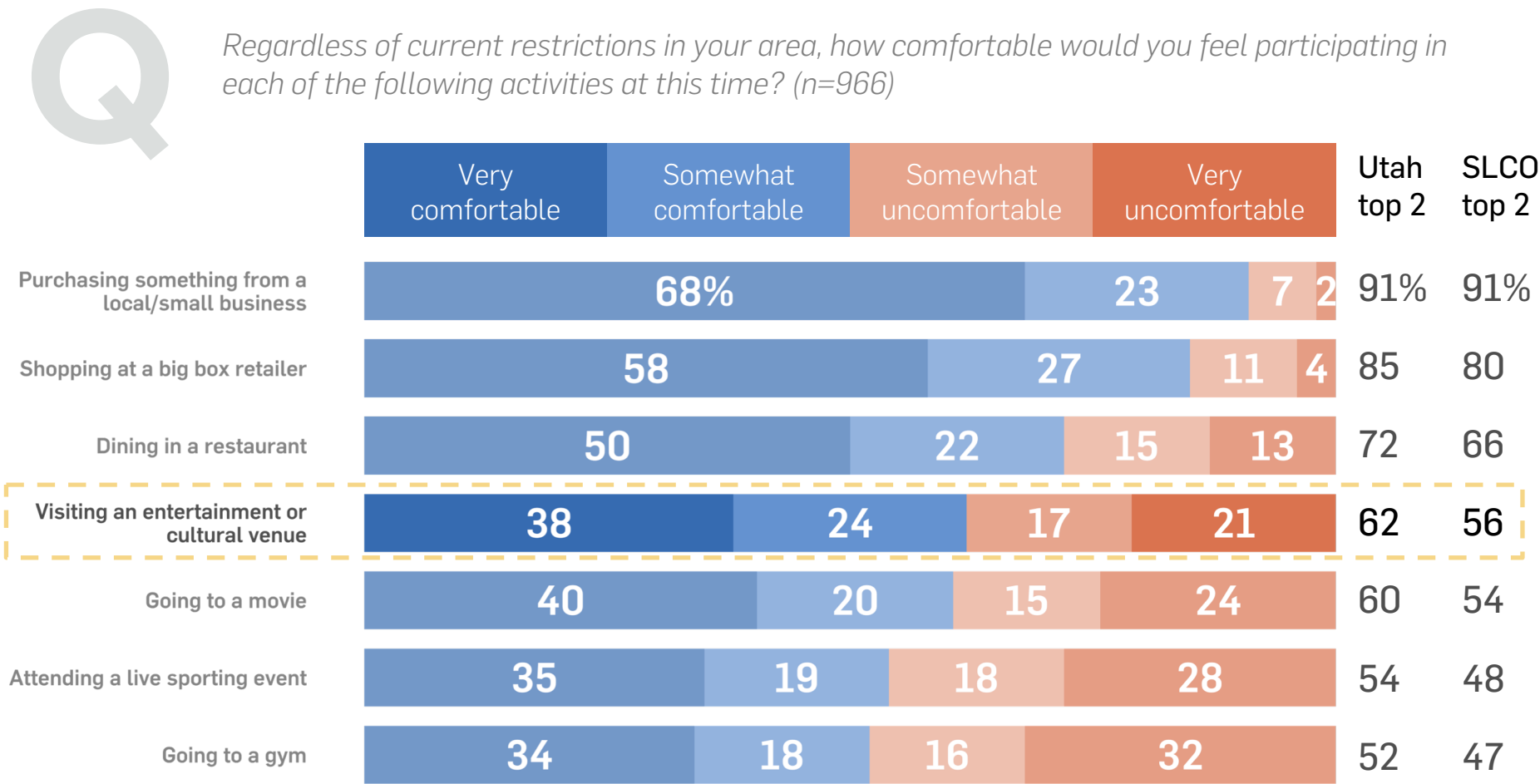
CULTURAL INDUSTRY JOBS AFFECTED BY COVID-19



- THE LEISURE & HOSPITALITY INDUSTRY REPORTED A LOSS OF **\$70,580,061**
DATA COLLECTED BY GOED VIA SHOP IN UTAH AND LIVE EVENTS APPLICATIONS, FOR THE PERIOD OF MARCH-NOVEMBER 2020
- THE CULTURAL INDUSTRY REPORTED A LOSS OF **\$76,592,582**
DATA COLLECTED BY HERITAGE & ARTS VIA CREATE IN UTAH AND APPLICATIONS AND UCAF COVID ECONOMIC IMPACT SURVEY
- TICKET ROLLOVER LIABILITIES TOTALED **\$17.5 MILLION**

CLEAR & PRESENT DEMAND TO REENGAGE WITH THE CULTURAL SECTOR

Statewide, 62% of voters say they would currently be comfortable visiting entertainment or cultural venues.



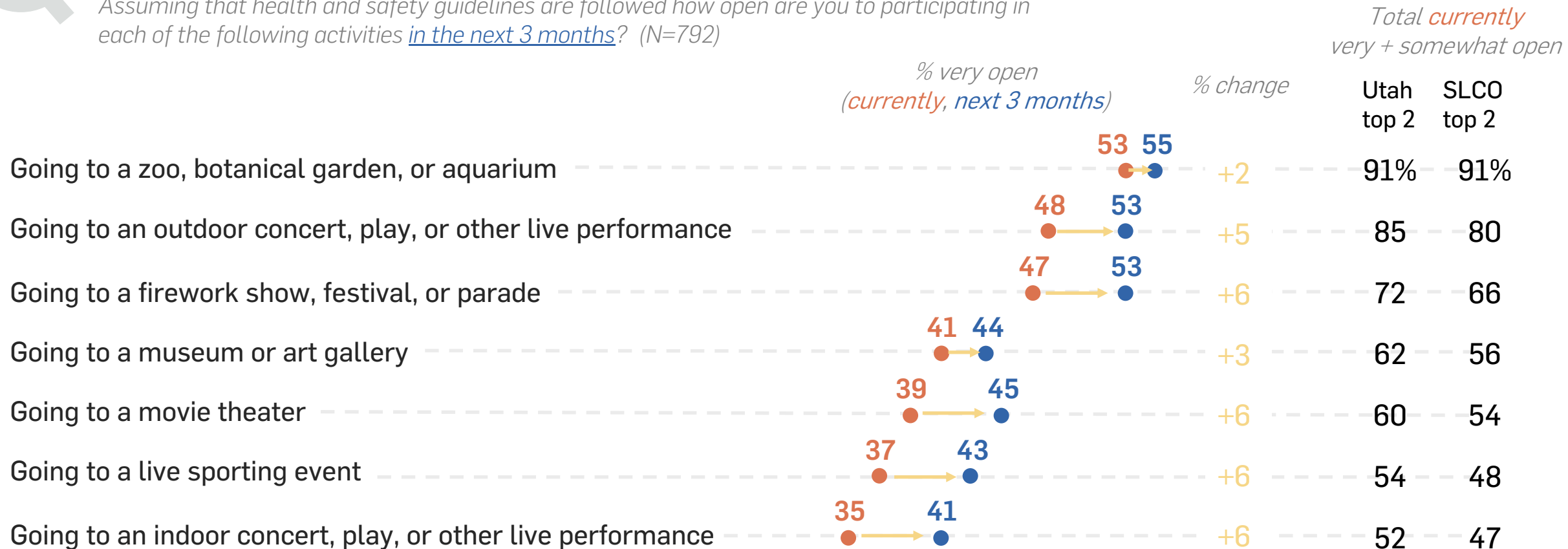
VOTERS MOST OPEN TO OUTDOOR EVENTS & ACTIVITIES

Nearly 80% of residents say they would be open to attending outdoor events such as going to a zoo, outdoor performance, or firework show. The activities residents are least open to include movies, live sporting events, and indoor performances. When asked about the next 3 months, the proportion very open to participating increases slightly, however the same general ranking holds.



Assuming health and safety guidelines are followed – how open would you be to participating in each of the following activities under current COVID conditions? (n=808)

Assuming that health and safety guidelines are followed how open are you to participating in each of the following activities in the next 3 months? (N=792)



AMONG THOSE CURRENTLY UNCOMFORTABLE, JUST OVER HALF WOULD VISIT WITHIN THE NEXT 6 MONTHS

99% of those voters who say they would not be comfortable participating now anticipate returning to the cultural sector, and just 13% expect it will take more than a year for them to feel comfortable doing so.

87% of respondents anticipate feeling comfortable attending live events within the next year. 53% anticipate feeling comfortable within 6 months and 20% in 3 months or less.



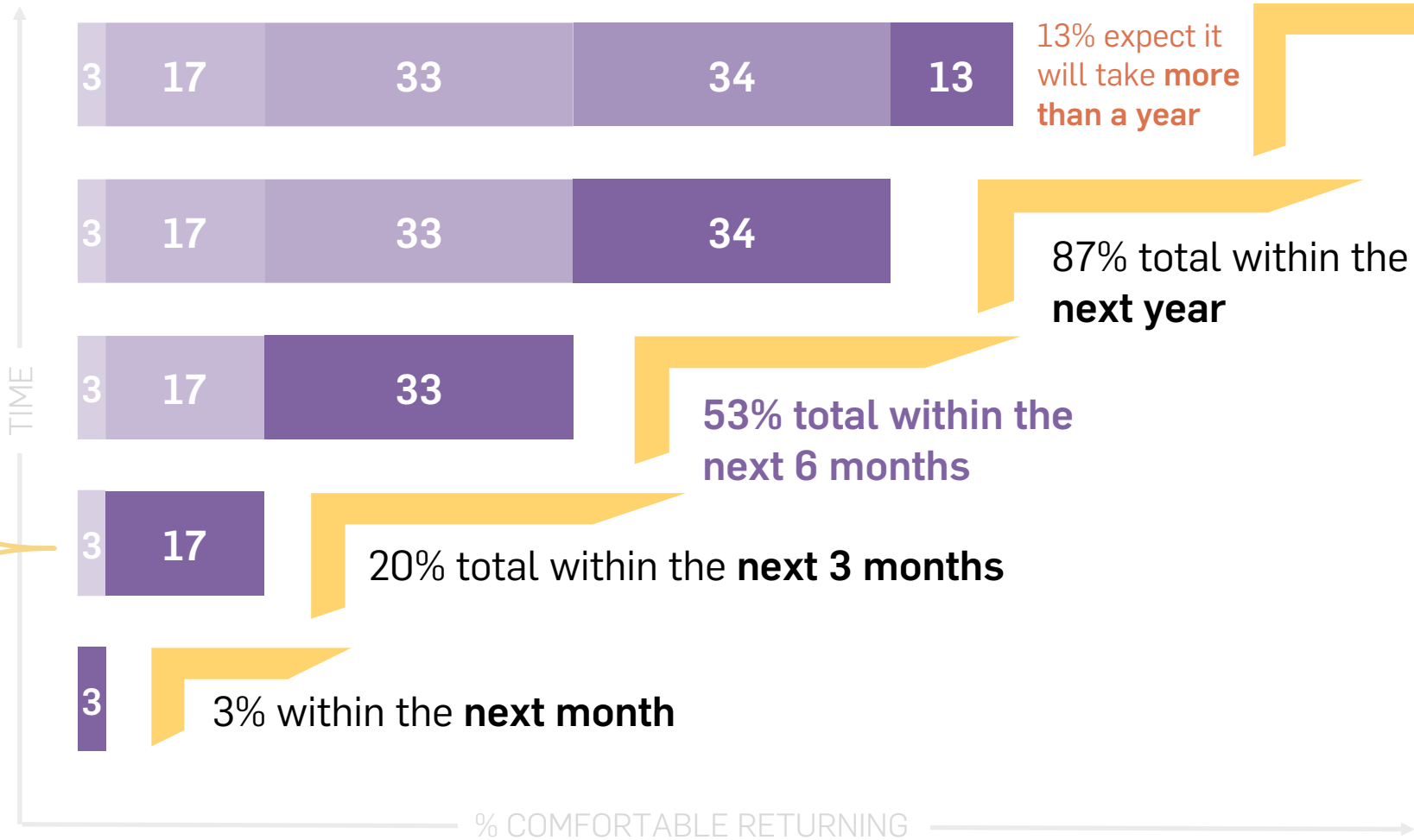
When do you anticipate feeling comfortable attending live events or visiting an entertainment or cultural venue? (n=376)

17%

Among those most concerned about *public health impacts*, 17% are willing to return *within the next 3 months*

27%

Among those most concerned about *economic impacts*, 27% are willing to return *within the next 3 months*



SAFETY MEASURES

SENTIMENTS SURROUNDING COVID PROTOCOLS

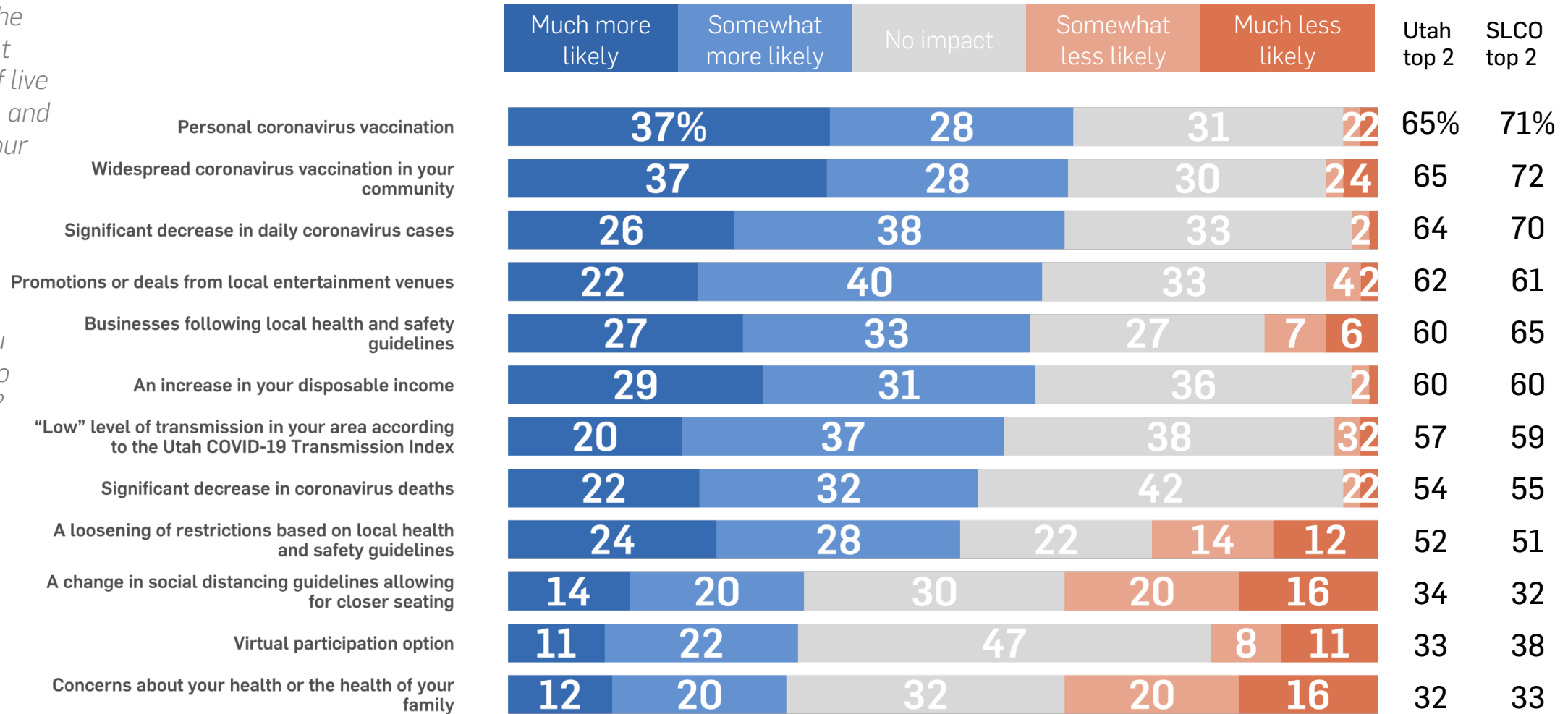
VACCINES AND SAFETY GUIDELINES KEY

The factors most likely to stimulate participation in live events are personal and community vaccinations. In addition, nearly a third of respondents say they would be “much more likely” to attend events if they experienced an increase in their disposable income or if businesses followed safety guidelines.



Thinking about the different types of live

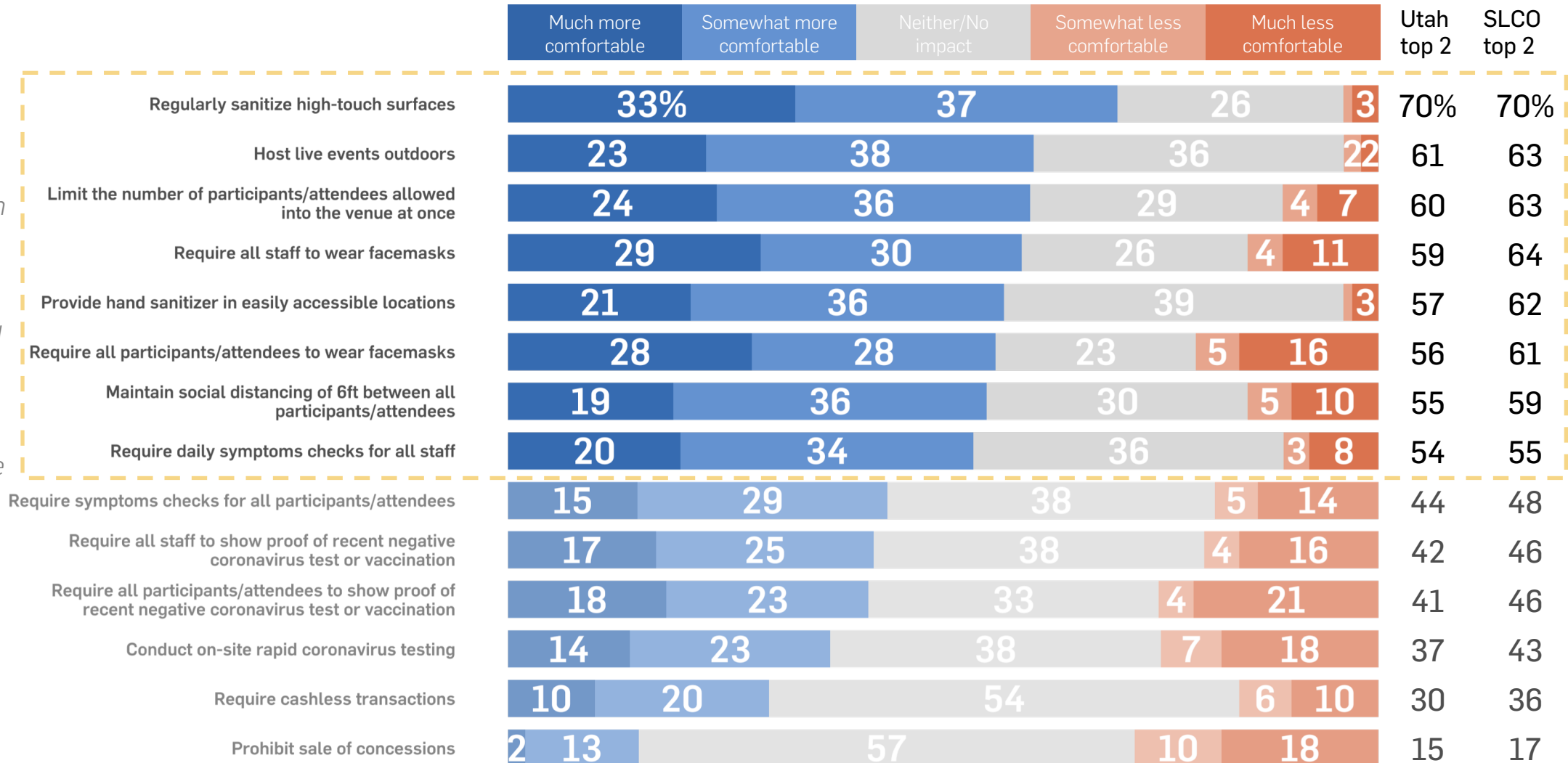
entertainment, arts, and cultural events in your community—like concerts, shows, or other live performances – would the following conditions make you more or less likely to attend such events? (n=885)



SANITIZATION INCREASES COMFORT MOST

70% of residents say they would be more comfortable attending events if surfaces were regularly sanitized. By contrast, at least 25% of Utahns say that requiring proof of a negative test or vaccination, onsite testing, or prohibition of concessions would make them less comfortable to attending events.

Q Thinking about the different types of live entertainment, arts, and cultural events in your community—like concerts, shows, or other live performances—would you feel more or less comfortable attending such events if venues were to... (n=842)

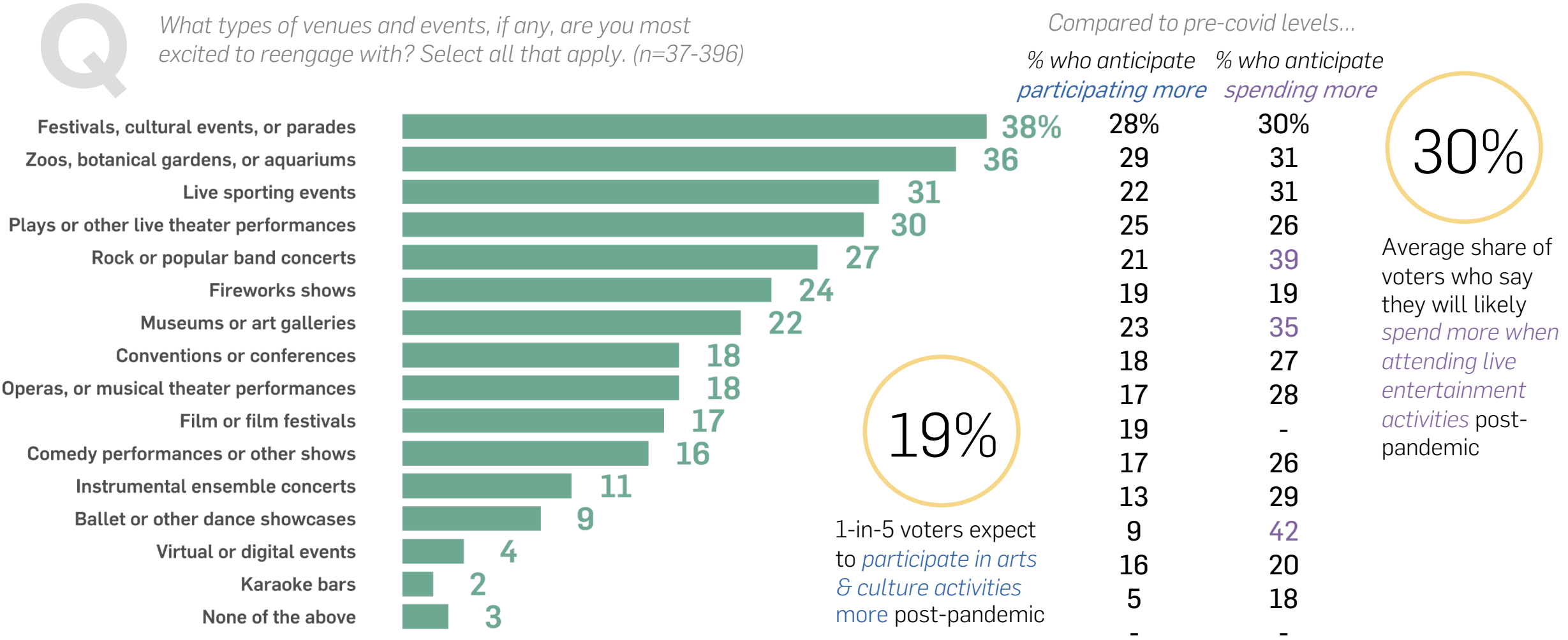


FUTURE ENGAGEMENT

EXPECTATIONS FOR ENTERTAINMENT IN A POST-COVID WORLD

VOTERS MOST LOOK FORWARD TO FESTIVALS, ZOOS, AND SPORTING EVENTS

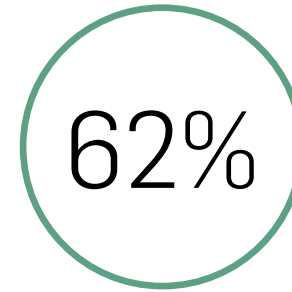
Utah audiences report being most excited to reengage with festivals and cultural events (38%), zoos and aquariums (36%), live sporting events (31%), and live theater performances (30%). Few express excitement to “reengage” with virtual events, and 22% say that they will participate in virtual or digital events less often.



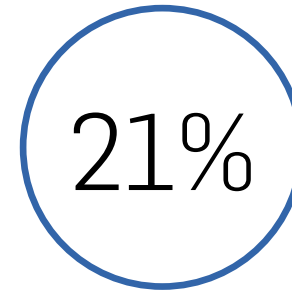
FREQUENT ARTS & CULTURE PATRONS

HIGHLIGHTS AMONG THE MOST ENGAGED AUDIENCE*

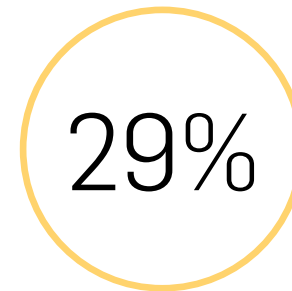
- Most interested in seeing venues **regularly sanitize high-touch surfaces (71%)** and **host outdoor events (61%)** – consistent with the preferences of voters at large.
- Most eager to return to **festivals, cultural events, and parades (48%)**. On average, these patrons are 10 percentage points more eager to reengage compared to all voters.
- Among those currently uncomfortable attending entertainment or cultural venues, **56% anticipate feeling comfortable returning within the next 6 months** (+3 percentage points compared to all voters).



Currently comfortable attending cultural venues



Anticipate attending more post-covid



Anticipate spending more post-covid

**Frequent patrons are voters who reported participating in one or more arts/cultural activities "often" pre-pandemic (n=794)*

ARTS & CULTURE – OPEN FOR BUSINESS!

INDUSTRY RESOURCES ARE AVAILABLE NOW

UTAH IS #1 NATIONWIDE

in art creation

UTAH IS #3 NATIONWIDE

in cultural event attendance



**Based on a study conducted by the National Endowment of the Arts*

SUPPORTING THE CREATIVE INDUSTRY

INVESTING IN ECONOMIC RECOVERY FOR ARTS & CULTURE IN UTAH

SUBSCRIBE

Renew your subscriptions or memberships to museums, dance, theater, and music organizations.

ATTEND & VISIT

Visit museums and galleries. Attend performing art events. Visit nowplayingutah.com for details on upcoming events.

DONATE

Whether you're contributing time or money, this is a great way to support your favorite cultural entities.

SPREAD THE WORD

We are open and taking the necessary precautions to ensure that audiences can safely attend our events and venues.

